

# BENEFIT SUMMARY AND ELIGIBILITY



For ease of reference, below is a summary of Willamette's generous benefits package.

Please note that Willamette reserves the right and authority to amend or terminate its benefit plans at any time as it deems necessary or appropriate, and nothing herein shall be construed to limit that right and authority. This summary provides a brief description of benefits, please refer to the benefits webpages for a complete list of benefits, limitations, and exclusions.

## EFFECTIVE DATE OF ALL PLANS

Hired First Day of Month	Benefits effective on date of hire
Hired on Second Day of Month or Later	Benefits effective first day of the month following hire

## HEALTHCARE AND DENTAL COVERAGE

Eligibility	Work 60% of a full-time schedule annually
Cost to Employee	Cost varies based on salary tier (see rate summary)
Plans	PPO and HMO healthcare options, which include medical, vision, prescription, <b>alternative care</b> ( <i>massage, chiropractic, acupuncture</i> ), behavioral health, dental and orthodontic benefit coverage
Healthcare Opt-Out	Eligible employees that decline coverage and provide evidence of their other insurance receive \$100 stipend per month. This taxable benefit can be directed to a pre-tax flexible spending account, if desired.

## LIFE, ACCIDENTAL DEATH AND DISMEMBERMENT, AND LONG-TERM DISABILITY PLANS

Eligibility	Work 75% of a full-time schedule annually
Cost to Employee	<b>No cost</b> for basic Life, AD&D, or LTD. Fully paid by Willamette University.
Plan	Term life insurance and accidental death and dismemberment equal to <b>two (2) times</b> annual base salary
Voluntary Life	Group rates on voluntary term life for employee up to five (5) times base annual salary and options available for spouse/domestic partner and children
LTD Benefit	Replaces <b>60% of income</b> up to \$6,000 per month after 90-day period

## FLEXIBLE SPENDING ACCOUNT PLANS

Eligibility	Work 60% of a full-time schedule annually
Plan Options	Healthcare, Dependent Care, Mass Transit
Flex Benefits	FSA allows for savings up to the IRS limit to pay for approved medical, transit and/or dependent care expenses <b>tax-free</b>

## RETIREMENT SAVINGS PLAN - EMPLOYER CONTRIBUTION

Eligibility	Work 48% of a full-time schedule annually (visiting faculty/adjuncts and temporary employees are not eligible)
Employee Mandatory Contribution	1% of gross base salary
University Contribution	<b>5% of gross salary</b>
Voluntary Contributions	Eligible to contribute up to IRS elective deferral limits

## RETIREMENT SAVINGS PLAN - VOLUNTARY EMPLOYEE ONLY CONTRIBUTION

Eligibility	You must be 18 years or older and a regular employee
Voluntary Contributions	Eligible to contribute up to IRS elective deferral limits

## TUITION BENEFITS AT WILLAMETTE UNIVERSITY

<b>Eligibility</b>	Employee works 75% of a full-time schedule AND For Employee Tuition Benefit: <ul style="list-style-type: none"> <li>• Three (3) years employment at 75% for graduate programs • Six (6) months employment at 75% for undergraduate programs</li> </ul> Dependent Child Benefit: <ul style="list-style-type: none"> <li>• Employee completes five (5) years of service at 75% and dependent child is eligible in sixth year (see requirements regarding tax status as dependent). For dependent children benefits, a service credit is available for service at other institutions of higher education</li> </ul>
<b>Employee Tuition Benefits</b>	<ul style="list-style-type: none"> <li>• Must be admitted to the school subject to regular admission standards</li> <li>• Subject to approval of supervisor</li> <li>• Employee may not take more than part-time course load</li> <li>• One course per semester at 100% and any additional courses at 50%</li> </ul>
<b>Dependent Children Benefits</b>	<b>100% tuition</b> at Willamette University or reduced tuition through tuition exchange participation for eight (8) semesters of undergraduate education

## TUITION BENEFITS THROUGH TUITION EXCHANGE PROGRAMS

<b>Eligibility</b>	<ul style="list-style-type: none"> <li>• Employee works 75% of a full-time schedule annually</li> <li>• Dependent Child Benefit Only:-Dependent Child eligible after an employee completes five (5) years of full-time service. For dependent children benefits, a service credit is available for service at other institutions of higher education.</li> </ul>
<b>Dependent Children Benefits</b>	Must be admitted to the school subject to regular admission standards. Tuition exchange participation for eight (8) semesters of undergraduate education.

## PAID TIME AWAY FROM WORK - VACATION, PERSONAL, HOLIDAYS, AND BEREAVEMENT

<b>Eligibility</b>	Work 60% of a full-time schedule annually Employees who are employed less than full time but more than 60% accrue a proportional amount
<b>Vacation Benefit</b>	Accruals start at <b>20 days</b> per year with a cap of 240 hours
<b>Personal Preference Time</b>	Salaried employees: 1 day per year, Hourly employees: 2 days per year
<b>Holidays</b>	<b>See full holiday schedule</b>
<b>Personal Holidays</b>	Salaried: <b>1</b> day per year, Hourly: <b>2</b> days per year
<b>Bereavement</b>	Up to <b>3</b> days per event
<b>Appointment Leave</b>	Hourly employees working full time: <b>8</b> hours per year

## TIME AWAY FROM WORK - SICK TIME

<b>Eligibility</b>	All employees
<b>Sick Leave</b>	<ul style="list-style-type: none"> <li>• Employees working full time may earn up to 8 hours per month of paid sick leave</li> <li>• Employees working less than full time will earn paid sick leave on a pro-rated basis</li> <li>• Sick leave is capped at 80 hours for all faculty, staff, and student employees working less than 60% of full time</li> </ul>

## ADDITIONAL BENEFITS

<b>Eligibility</b>	Eligibility varies - see specific plans
<b>Auto, Home, Personal Property and Pet Insurance</b>	Special discounted group rates for your auto, home, and pet insurance
<b>Credit Union</b>	Marion and Polk Schools (MAPS) Credit Union
<b>Critical Illness and Accident Insurance</b>	Voluntary Insurance to help with out-of-pocket expenses in the event of a major illness or injury.
<b>Employee Assistance Program (EAP)</b>	Free counseling and health coaching
<b>Employee Discounts</b>	Bookstore Discount, Cell Phone Discounts
<b>Food Service</b>	10% discount when you show your Compass Card

<b>Legal Services &amp; Identity Theft</b>	Voluntary Legal Services and Identity Theft Protection
<b>Libraries</b>	Borrow library materials from on and off campus
<b>Notary Public Services</b>	Authorized WU employees provide services at no charge
<b>Subsidized Bus Passes</b>	Subsidized Bus passes for Salem's Cherriots bus system
<b>University Recreation and Entertainment</b>	Free access to the fitness center and museum, and discounted or free tickets to athletics, theater, and music events.